



# Sage ERP Accpac Roadmap

May 2011



*This roadmap is intended for use as a guideline and for information purposes only, and represents Sage's current view of its product direction.*

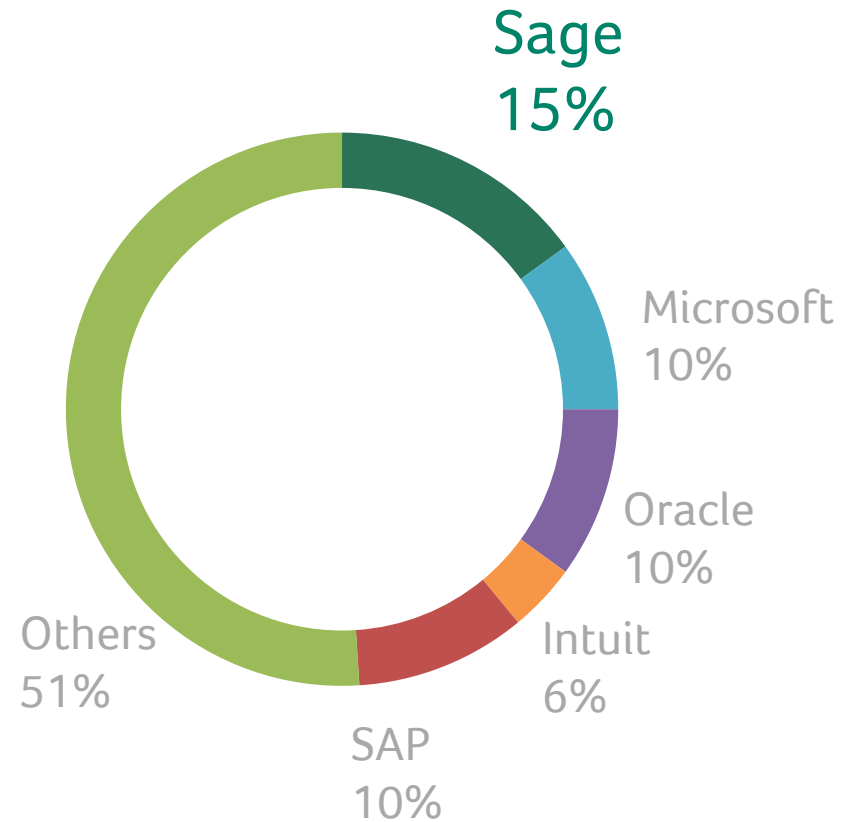
*The information is **subject to change** at any time without notice.*

*As Sage develops products using an Agile development methodology, any one of the milestones, features, release periods or versions could change. None of the information should be interpreted as a commitment on the part of Sage.*



# Sage is #1 Worldwide\*

- A global publicly traded company
- Over 13,000 employees
- Over 6 million customers
- Over 25 years of experience



Source: \*IDC #220937, Worldwide ERP 2008 Vendor Analysis, published December 2009. Based on ERP revenue small business; <1000 employees



# Sage Overview

## Market

Global company with over 13,400 employees

6.3 million customers worldwide

One of the market leaders in the UK, North America, Europe, South Africa and Asia

## Finances

Revenue of \$2.24B for FY2010

Market capitalization of approximately \$4.3 billion

Made over 40 acquisitions since 1991

## Customers

Provide advice to customers through 1.7 million support contracts

Manage around 40,000 customer calls each day

Work with over 27,000 reseller partners and over 40,000 accountants worldwide



# Sage ERP Accpac

Serving over  
**45,000**  
customers

- Sage global strategic product
- Fully integrated business management solution
- Superior architecture that grows with your business
- Global reach, local touch
- Collaborative ecosystem
- Deployment options for on-premise or on-demand (cloud)



# Sage ERP Accpac Product Roadmap

## Version 6.0

Q4 2010

- Portal
- Snapshots
- Inquiry
- SageCRM workflow
- Fiscal period locking

## Sage ERP Accpac Online

Q2 2011

- Intelligence available
- Disaster Recovery expanded

## Version 6.1

Q4 2011

- Web Client for Financial and Operational modules
- Improved usability
- Mobile support
- Expanded virtual platforms

## Version 6.2

2012

- Approval workflows
- Payroll web
- User Management
- Customizer
- Sage Advisor

2011

2012

## Intelligence Designer

Q2 2011

- Report Design Wizard
- What-if Scenario Analysis

## Product Update

Q2 2011

- Bank Rec individual receipt

## Payment Processing

Q2 2011

- Credit Card Processing
- Integrated to AR and OE

## MS SQL Server

Q2 2011

- Competitive Upgrade pricing

## Sage Sales Tax

Q3 2011

## SageCRM v7.1

Q3 2011

- eMarketing
- iPhone App
- Twitter integration
- Total campaign management
- MS Exchange integration
- Interactive dashboard



# Sage ERP Technology Stack

Extending ERP with Sage Web Technology

SData web services

Sage Web Toolkit

Auto-Update

Customizer

Sage Advisor

Sage Portal

Sage Exchange

Web provisioning infrastructure

Enables the creation of

Mobile Apps

Web Apps

Web Screens

Application Integrations

Mash-ups

Snapshots

Providing to customers

Workflow enhancements

Usability enhancements

Self service

Integrated end-to-end solutions

Connected services

Deployment options

Embedded business intelligence

Ubiquitous access



Sage ERP

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## Sage ERP Accpac Version 6.0

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Now Available!





# Now Available: Sage ERP Accpac 6.0

## ● Increase Productivity

- Role based, personalized Portal
- Task oriented navigation
- Manage fiscal periods by module

## ● Envision Success

- Enhance visibility into metrics with Snapshots
- Quick information lists through ad-hoc Inquiry

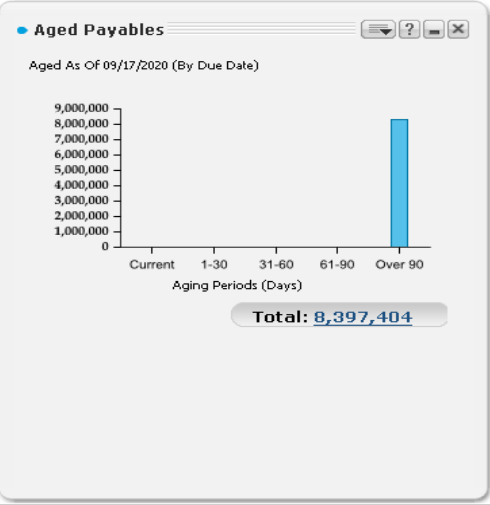
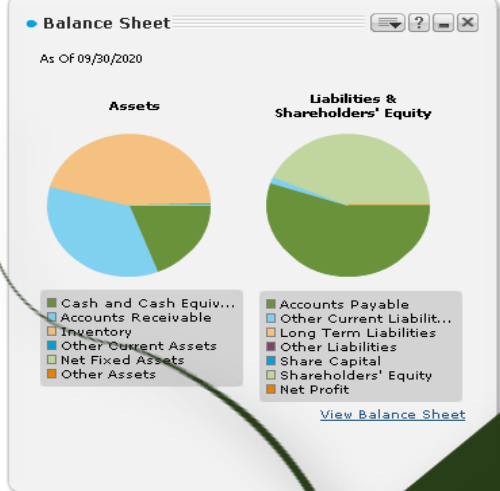
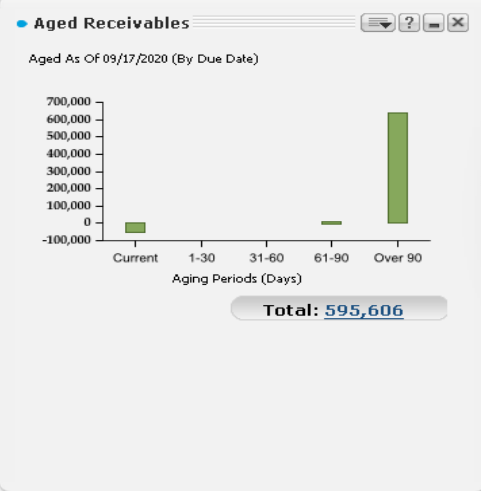
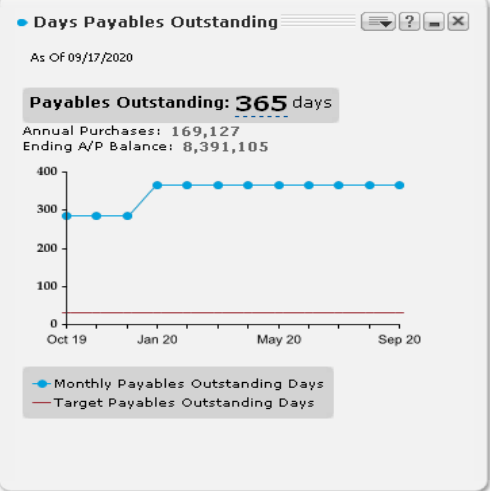
## ● Accelerate Growth

- Enhanced quote-to-order workflow for SageCRM users
- Improved usability



Home

Add Snapshots



- ### Getting Started
- 🔔 What's New in this Version?
  - 📄 Customize Your Home Page
  - 📄 Get Started with Snapshots
  - 📄 Create a Query
  - 🌐 Visit the Sage ERP Accpac Community
  - 🔍 Search the Learning Center
  - 📺 Browse Video Tutorials
  - 🎓 Browse Courses at Sage University
  - 💡 Tell Us How to Improve this Product



# Learn more about Version 6.0 at [www.sageerpaccpac6.com](http://www.sageerpaccpac6.com)



## Sage University

Free anytime learning course  
[www.sageu.com/accpac](http://www.sageu.com/accpac)



5 minute overview video  
[www.youtube.com/watch?v=HYUErIxYiPg](http://www.youtube.com/watch?v=HYUErIxYiPg)

The Sage ERP Learning Channel  
[www.youtube.com/user/SageUERPLearning](http://www.youtube.com/user/SageUERPLearning)

Interactive Documentation  
[www.youtube.com/user/SageAccpacDoc](http://www.youtube.com/user/SageAccpacDoc)



# Version 6.0 - Product Update 1

## ● Bank Services – Improve Productivity

- Faster deposit reconciling, as you can now clear individual receipts within a deposit
- On both the Deposit Register and the Reconciliation Status report, you can now filter deposits with a status of Reconcile by Deposit Detail



The screenshot displays the Sage ERP Solutions feedback interface. At the top left, the text 'Sage ERP Solutions' is visible. On the right side, there are navigation icons for 'Suggest', 'Collaborate', and 'Vote', along with 'Login | Sign Up' links. The main content area features a suggestion card with the following details:

- 66** votes
- Vote for** button
- clear individual receipts in a deposit batch -** (title)
- by: Stacey O. | about a year ago | 1 - Financial Management
- planned** status tag
- Text: *In previous versions of Accpac you could click on the detail of a deposit in the bank rec Screen and then mark off individual receipts. You can no longer do this. Can this feature be put back in the system as it is very valuable. Once again explaining to users that a feature they previously had, once they upgrade they will lose, makes it difficult to upgrade clients.*

On the right side of the card, there is a red box with the text 'Cast your vote or comment ...' and a link 'return to idea list'.

Feedback from  
[www.sageaccpac.com/feedback](http://www.sageaccpac.com/feedback)

# Version 6.0 - Product Update 1

## ● Accounts Receivable

- You can now see and edit the Deposit Date on the Receipt Entry form

## ● Order Entry

- Get the ability to return serialized and lot items to a location other than the location from which the items were shipped

## ● Project and Job Costing

- Create a new invoice batch in Accounts Receivable when you post a billing worksheet, even if there is an unposted job-related batch in Accounts Receivable



# Sage SmartBusinessReports

A Sage  
Connected  
Service

- Powered by Experian offers Sage's business customers:
  - Easy to read business credit reports on their company, or on their customers
  - Business credit monitoring and alerts
- Access business credit reports at
  - <http://www.smartbusinessreports.com/?link=1241>



Get one **FREE** credit report at  
<http://promo.smartbusinessreports.com/sage>



Sage ERP

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## Microsoft SQL Server

Competitive Upgrade Pricing



# Microsoft SQL Server Runtime Edition

- Microsoft SQL Server available from Sage

- Offers same functionality and performance as Microsoft SQL Server 2008 R2 Standard edition
- Can be used with Sage products and integrated solutions
- No restrictions on users or database size

- Licensing

- Client Access License (CAL) per user - \$175
- CAL Competitive Upgrade per user - \$75 – **NEW**
  - Available for upgrades from Pervasive to MS SQL Server
  - Available for upgrades from Quickbooks, Simply, Peachtree and other competitive products using non-Microsoft databases
- Per Processor License for unlimited usage - \$5,000







Sage ERP

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## Sage ERP Accpac Intelligence

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Now Available!

sage

# Sage ERP Accpac Intelligence

- Complex reporting made easy
  - Business Intelligence in a familiar Microsoft Excel interface
  - Easily customizable “out of the box” financial, sales, purchasing, and inventory report templates and dashboards
- Transform your data into information
  - Powerful multi-dimensional analysis
  - Perform what-if scenarios that go beyond just transactional data
- Consolidate data from multiple companies and multiple sources

**Free  
Report Manager  
included with Sage  
ERP Accpac**



# DASHBOARD - SAMPLE COMPANY INC.

Period: **January 2011 to August 2011**

Profit & Loss	Actual Aug-11	Budget Aug-11	Variance	Actual YTD	Budget YTD	Variance
Sales	25,097	(22,000)	47,097	63,597	(22,000)	85,597
Cost of Sales	5,505	5,200	(305)	5,505	5,200	(305)
<b>Gross Profit</b>	<b>19,593</b>	<b>(27,200)</b>	<b>46,793</b>	<b>58,093</b>	<b>(27,200)</b>	<b>85,293</b>
Expenses	-	-	-	-	-	-
<b>Net Income before tax</b>	<b>19,593</b>	<b>(27,200)</b>	<b>46,793</b>	<b>58,093</b>	<b>(27,200)</b>	<b>85,293</b>

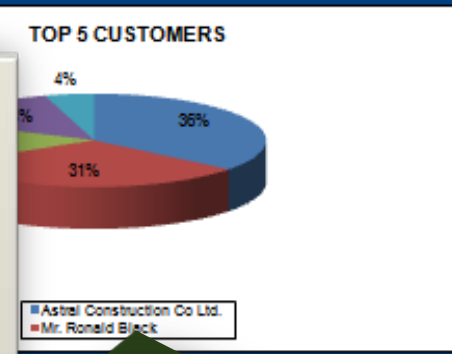
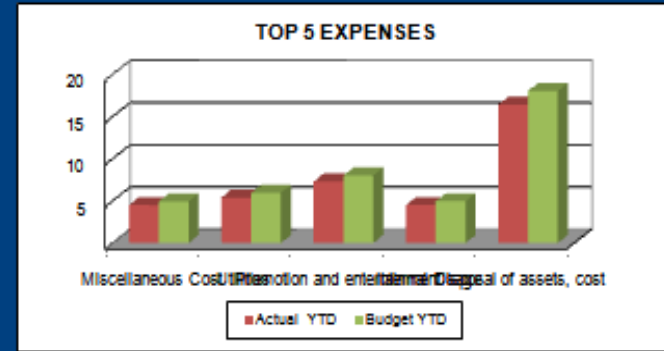
Top 5 Expenses	Actual Aug-11	Budget Aug-11	Variance	Actual YTD	Budget YTD	Variance
Miscellaneous Cost	1,500	1,650	150	4,500	4,950	450
Utilities	1,800	1,980	180	5,400	5,940	540
Promotion and entertainment	2,430	2,673	243	7,290	8,019	729
Internal Usage	1,503	1,653	150	4,509	4,960	451
Disposal of assets, cost	5,468	6,015	547	16,404	18,044	1,640

**12,700**

Top 5 Customers	YTD
Astral Construction Co Ltd.	6,900
Mr. Ronald Black	5,900
J & Y Builders Ltd.	2,800
ACME Plumbing	2,600
The Courtyard	900
<b>Total</b>	<b>19,300</b>

Top 5 Items	YTD
Fluorescent Desk Lamp	5,900
Computer mouse	5,200
CPU	3,000
Computer Keyboard	2,500
Tower Case	1,900

Bottom 5 Items	YTD
13'w Mini Fluorescent	2,900
Bulletin Board	1,100
Desk Calendar Pad	5,400
Halogen Desk Light	7,300



Your data pulled directly into **Excel**

# Sage ERP Accpac Intelligence Designer



- Simplified “drag and drop” custom report creation
- Wizard to quickly create new customized layouts with multilevel groupings
- Column and page level groupings by any field
- Instant “what-if” scenario analysis

Learn more at  
<http://www.sageaccpac.com/lp/sai/solutions>



## Sage University

Free anytime learning course  
[www.sageu.com/accpac](http://www.sageu.com/accpac)



The Sage ERP Learning Channel  
[www.youtube.com/user/SageUERPLearning](http://www.youtube.com/user/SageUERPLearning)



Sage ERP

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# Sage ERP Accpac Payment Processing

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Available May 2011



# Sage ERP Accpac Payment Processing

- Eliminates manual data entry and reduces the risk of errors
- Uses the power of Sage Exchange to drive payment transactions into Sage ERP Accpac
- Reduces fraud exposure and PCI compliance costs
- Improves cash flow management and forecasting
- Provides a consolidated view of payment activity

The screenshot displays the Sage Exchange - Authorization interface. The main heading is "Sage Payment Solutions". Below this, there is a "Payment Information" section with a "Bill To" field. The interface includes a "Reference 1" field, a "Card number" field (masked with "XXXX-XXXX-XXXX-1111"), an "Expiration date" field (set to 02/15), and a "CVV" field. A "Stripe Card" button and an "Edit" link are also present. To the right, a summary table shows: Subtotal (200.00), Tax (9.00), Shipping (9.00), and Total (200.00). A "Click For Support" button is located in the top right corner. Below the summary table, there is a "Thank you for using Sage Exchange" message and the date "2/15/2011". At the bottom, there are "Back", "Next", "Submit", and "Cancel" buttons. The Sage logo is visible in the bottom right corner of the interface.



# Powerful Payment Functionality

SAMLTD - Process Credit Card - Sale

Card ID: VISACAD Description: Visa Card - Canadian currency

Processing Code: WEBSTORE  Default Card  Enter a Card for One-Time Use

**Billing Details**

Cardholder Name: Joe Black  
Address: 12345 First Street  
City: Toronto  
State/Province: ON  
Zip/Postal Code: M2B 1Z9  
Country: Canada

**Totals**

Subtotal: 1,000.00  
Taxes: 0.000  
Total: 1,000.00

**Credit Card Details**

Card Type: Visa  
Card Number: xxxxxxxxxxxxxxxx1111  
Expiration Date: 04/13

**Transaction Details**

Time:   
Authorization Code:   
No credit card charged.

Comments: Credit card for purchase in Canadian dollars.

Process Payment

Close

Free module  
with  
Version 6.0

- Take credit cards as payments on open invoices or as deposits on sales orders
- Swipe credit cards when the credit card is present
- Refund credit card transactions back to original credit card
- Perform reconciliation of credit card transactions between the processor and the company
- Store multiple cards per company and identify the default card to use



# Workflow Example – AR Receipt Payment

The screenshot shows the 'SAML TD - A/R Receipt Entry' window. The interface includes a menu bar (File, Settings, Help) and a main data entry area. A callout bubble points to the 'Charge...' button at the bottom left.

Batch Number	66	Credit card batch					
Batch Date	04/01/2011	No. of Entries	1	Total Amount	1,000.000		
Bank	CCB	Default Currency	CAD	Deposit Number	55	Deposit Date	04/01/2011
Entry Number	1						
Transaction Type	Prepayment	Receipt Date	04/01/2011	Posting Date	04/01/2011	2011 - 04	
Customer Number	1200	Mr. Ronald Black	Currency	USD			
Reference		Account Set	USA				
Payment Code	SPSPAYMENT	Processing Code	WEBSTORE	Check/Receipt No.	000000066-00001	Not charged	
Document Number	PP00000000000000000031	Job Related	<input type="checkbox"/>				
Receipt Amount	1,000.00	CAD	Customer Amount	720.82	USD	Optional Fields	<input checked="" type="checkbox"/>
Apply By	Document Number	Apply To					

**Add a Receipt, then simply enter Payment information and select "Charge"**

Buttons at the bottom: Save, Delete, Charge..., Jobs..., Rates..., Deposit..., Print Receipt..., Close

# Process Credit Card – Sale Form

The screenshot shows a software window titled "SAMLTD - Process Credit Card - Sale". The form contains several sections: "Card ID" (VISACAD), "Description" (Visa Card - Canadian currency), "Processing Code" (WEBSTORE), "Billing Details" (Cardholder Name: Joe Black, Address: 12345 First Street, City: Toronto, State/Province: ON, Zip/Postal Code: M2B 1Z9, Country: Canada), "Totals" (Subtotal: 1,000.00, Taxes: 0.000, Total: 1,000.00), "Credit Card Details" (Card Type: Visa, Card Number: XXXXXXXXXXXXXXX1111, Expiration Date: 04/13), and "Comments" (Credit card for purchase in Canadian dollars.). A "Process Payment" button is located at the bottom right. Three callouts are present: a yellow oval around the Card ID field, a yellow oval around the "Enter a Card for One-Time Use" checkbox, and a green oval around the "Process Payment" button. A large yellow circle in the center contains the text "Select Card ID or Enter Card for One-Time Use", and a large green circle at the bottom contains the text "Select 'Process Payment' to call Sage Exchange".

**Card ID** VISACAD **Description** Visa Card - Canadian currency

**Processing Code** WEBSTORE  Default Card  Enter a Card for One-Time Use

**Billing Details**

Cardholder Name: Joe Black  
Address: 12345 First Street  
City: Toronto  
State/Province: ON  
Zip/Postal Code: M2B 1Z9  
Country: Canada

**Totals**

Subtotal	1,000.00
Taxes	0.000
Total	1,000.00

**Credit Card Details**

Card Type: Visa  
Card Number: XXXXXXXXXXXXXXX1111  
Expiration Date: 04/13

**Comments**  
Credit card for purchase in Canadian dollars.

**Process Payment**

**Select Card ID or Enter Card for One-Time Use**

**Select "Process Payment" to call Sage Exchange**

Close

# Process Credit Card – Sale

Sage Exchange processes payment details

SE Sage Exchange - Sale

## Sage Payment Solutions

Payment Information — Bill To

Reference 1	<input type="text"/>	Subtotal	<input type="text" value="1000.00"/>	<b>Click For Support</b>  Thank you for using Sage Exchange  2/15/2011
Card number	<input type="text" value="XXXX-XXXX-XXXX-1111"/>	Tax	<input type="text" value="0.00"/>	
	<input type="button" value="Swipe Card"/>	Shipping	<input type="text" value="0.00"/>	
Expiration date	<input type="text" value="02"/> <input type="text" value="13"/>	Total	<input type="text" value="1000.00"/>	
CVV	<input type="text"/>			

[Edit](#)

sage

00:14:39

# Process Credit Card – Sale Completed

**SAMLTD - Process Credit Card - Sale**

File Help

Card ID: VISACAD Description: Visa Card - Canadian currency

Processing Code: WEBSTORE  Default Card  Enter a Card for One-Time Use

**Billing Details**

Cardholder Name: Joe Black  
Address: 12345 First Street  
City: Toronto  
State/Province: ON  
Zip/Postal Code: M2B 1Z9  
Country: CA

**Totals**

Subtotal	1,000.00
Taxes	0.000
Total	1,000.00

**Credit Card Details**

Card Type: Visa  
Card Number: XXXXXXXXXXXXXXX1111  
Expiration Date: /

Process Payment

**Transaction Details**

Time: 4/1/2011 6:36:43 PM  
Authorization Code: 403403

Credit card charged.

Comments: Credit card for purchase in Canadian dollars.

Close

**Authorization Code and Transaction Information stored securely in Sage ERP Accpac**

# Get Your Sage Merchant Account Now!

- Engage a Sage Connected Services Specialist

- Call 1-877-541-1681 ext. 340123, or
- Email your contact information to [AccpacConnectedServices@sage.com](mailto:AccpacConnectedServices@sage.com)

- Call your Sage Business Partner to order the Module

- Free module for customers on a Sage business care plan
- Available for Version 6.0 now, for Version 5.6 in July 2011
- Requires Product Update 1 for Version 6.0 or Product Update 3 for Version 5.6



Free Payment  
Processing  
module



# Learn more at

<http://www.sageaccpac.com/paymentprocessing>



## Sage University

Free anytime learning course

[www.sageu.com/accpac](http://www.sageu.com/accpac)

PCI Compliance Information

<http://www.sageaccpacinfo.com/PCI/>

Sage Exchange - Integrated Payment Solutions

<http://www.sagepayments.com/Sage-Services/Sage-Exchange.aspx>

The Sage ERP Learning Channel

[www.youtube.com/user/SageUERPLearning](http://www.youtube.com/user/SageUERPLearning)



Sage ERP

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## Sage ERP Accpac Online

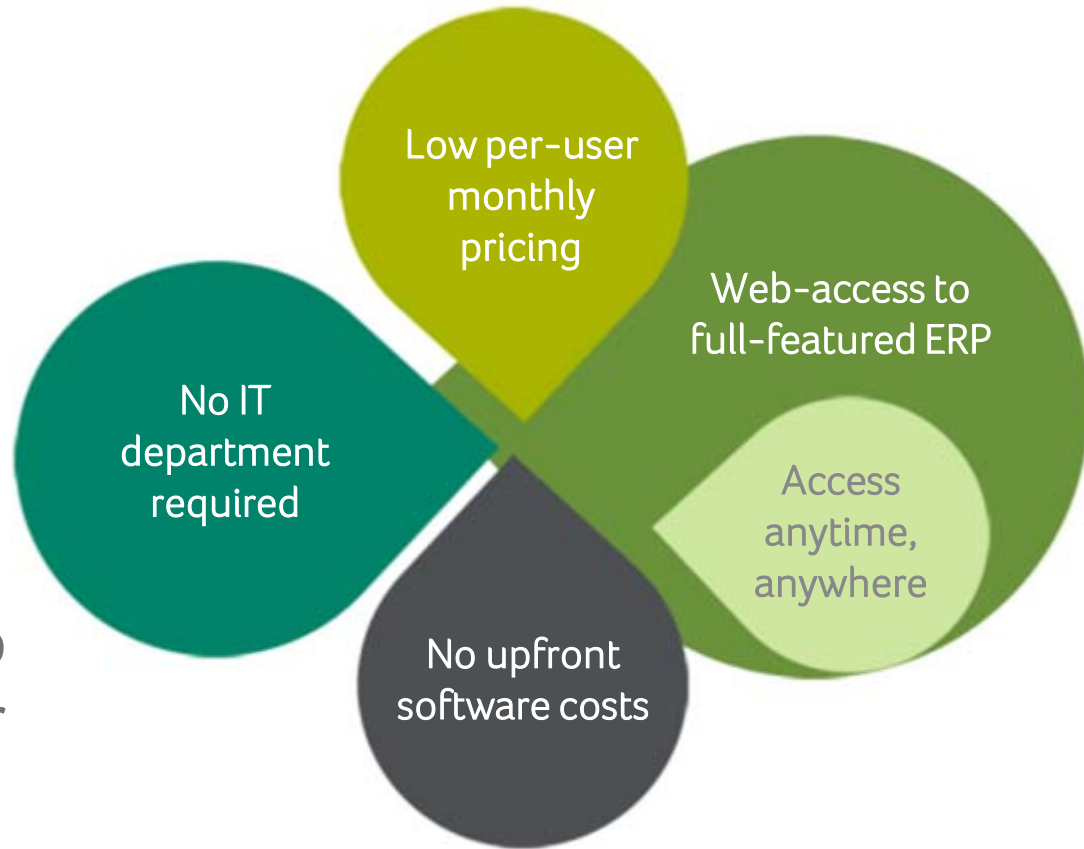
Cloud Deployment Option

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# Sage ERP Accpac Online

- Cloud deployment hosted by Sage
- Deployment option for customers with
  - Short implementation timeframe
  - Limited IT staff or budget
- Seamless migration to on-premise when your business grows



Learn more at  
[www.sageaccpaonline.com](http://www.sageaccpaonline.com)



# Sage ERP Accpac Online – What's New

- ◆ Sage Accpac Intelligence now available
- ◆ Enhanced fully automated Disaster Recovery Plan
  - Recovery Time: < 6 hours
  - Near real-time data replication
  - Fully redundant environment

Sage ERP Accpac Online

On-Demand Business Management Solution:

PRODUCTS SUPPORT AND SERVICES SUBSCRIBE LOG ON

Seamlessly transition to Sage Accpac on-site installation anytime.

Sage Accpac Online  
Stay connected anytime, anywhere.

Subscribe Now

Request Info

Related Links

- [Sage Accpac Online Brochure](#)
- [Sage Accpac ERP On-Site Product](#)
- [SageCRM for Sage Accpac](#)
- [Support Plans](#)
- [Customer Success Stories](#)

News & Events Customers On-Site or On-Demand?

# Hosting Infrastructure



- 99.874% recorded uptime for 2010
- Hosting facilities operated by QTS Atlanta Metro Data Center
  - 2nd Largest Data Center in the world
  - 990,000 square feet in total enclosed space
  - On-site Georgia Power substation and direct fiber access
- SAS-70 Type II compliant

Learn more at

<http://www.qualitytech.com/facilities/atlanta-ga.jsp>





Sage ERP

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## Sales Tax for Sage

A New Connected Service

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sage

# Sage Sales Tax, powered by AvaTax

- Makes paying sales tax simple for any business.
- Automatically performs address validation, sales tax jurisdiction research, and rate calculation
  - Seamlessly integrated with Sage ERP Accpac
  - Covers all sales tax jurisdictions in US and Canada
- Protect yourself from the risk of an audit
- Eliminate the need to research and maintain sales tax codes or schedules
- Set best practices in sales tax compliance
- Get back to focusing on revenue-generating activities!

A Sage  
Connected  
Service



# Sage Sales Tax for Sage ERP Accpac

## ● Auto-Address

- Decrease data entry time and reduce shipping rates with the best source of address data in the country

## ● Auto-Jurisdiction

- Auto-Jurisdiction returns correct jurisdiction and sales tax rate for each transaction

## ● Statutory Requirements

- Reduce audit risk and ensure that you are charging the correct amounts, 13,000+ jurisdictions and counting

## ● Reporting

- Access all data securely online with ease
- Consolidate data on multiple companies

## ● Returns

- Automate the entire returns process and collect sales tax information from various internal and external sources



A Sage  
Connected  
Service



Learn more at  
<http://www.avalara.com/Sage>



Overview video

[http://www.avalara.com/Media/Flash/ACCPAC/  
WalkThroughACCPAC.swf](http://www.avalara.com/Media/Flash/ACCPAC/WalkThroughACCPAC.swf)





Sage ERP

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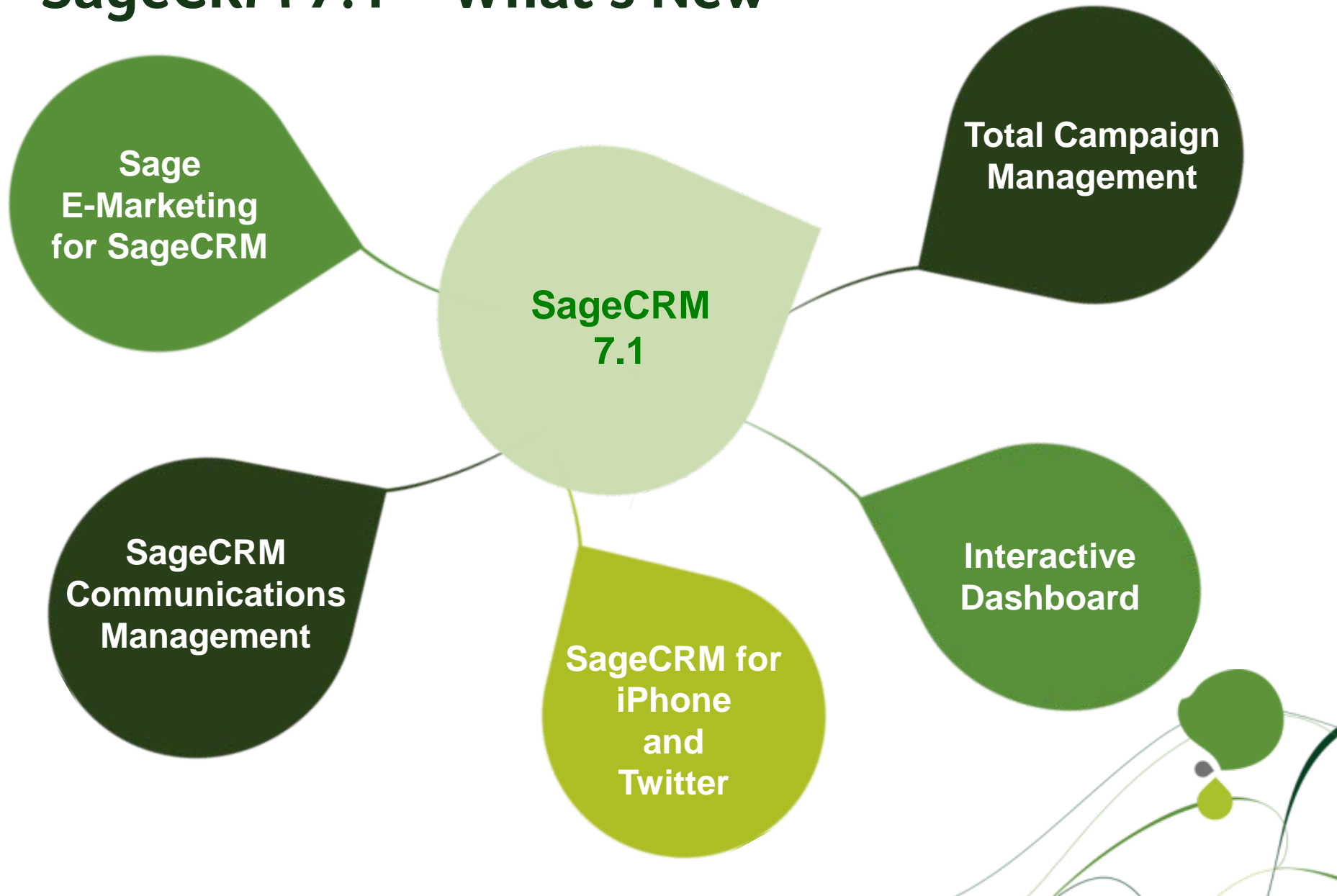
## SageCRM Version 7.1

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Integrated with Sage ERP Accpac 6.0 in Q3 2011



# SageCRM 7.1 – What's New





# Sage eMarketing for SageCRM

A Sage  
Connected  
Service

- Fully integrated E-marketing module to create custom, personalized e-mail marketing campaigns
  - Over 90 attention-grabbing templates out-of-the-box
  - Simple 3-step wizard for rapid execution
  - Custom landing pages for easy execution of cohesive, integrated marketing campaigns
- A Sage Connected Service
  - Low monthly subscription fee



# Sage eMarketing for SageCRM

A Sage  
Connected  
Service

- Analyze results without ever leaving SageCRM
  - Track and monitor recipient interaction such as sent, bounced, opened and click data
  - View, filter, report and export the results
  - Create new groups within SageCRM from the results

The screenshot displays the Sage eMarketing for SageCRM interface. It features an 'E-marketing Results Summary' table and an 'E-marketing Results Analysis' section with a 'Unique Opens By Time' report.

E-marketing Results Summary	
Subject	Submitted
<a href="#">Company group campaign wa</a>	10

E-marketing Results Analysis				
Select Report				
<a href="#">Opens &amp; Clicks</a>				
<a href="#">Unique Opens By Time</a>				
<a href="#">Unique Opens By E-mail</a>				
<a href="#">Opens By E-mail</a>				
<a href="#">Opens By Time</a>				
<a href="#">Unique Clicks By Link</a>				
<a href="#">Unique Clicks By E-mail</a>				
<a href="#">Clicks By Link</a>				
<a href="#">Unopened</a>				
<a href="#">Bounced</a>				
<a href="#">Unsent</a>				

Unique Opens By Time				
Local Time *	E-mail Address	First Name	Last Name	Opens
29/01/2011 13:47	bttnsi@gmail.com	F	qatest3	1
29/01/2011 13:49	qatest1@sage.com	E	qatest1	2
29/01/2011 13:50	trst.ntrsi@sage.com	B	qatest2	1
29/01/2011 13:47	bttnsi@gmail.com	F	qatest3	1
29/01/2011 13:49	qatest1@sage.com	E	qatest1	2
29/01/2011 13:50	trst.ntrsi@sage.com	B	qatest2	1

# Sage eMarketing for SageCRM

A Sage  
Connected  
Service

- Drip Marketing: Let SageCRM do the work!
  - Easy-to-create automated E-marketing Campaigns
  - Schedule a series of E-marketing activities based on the recipient interaction
  - Automatically create outbound call-lists based on recipients who are interested in your campaign

**Drip Campaign Stage**

**Send on:**  
1 Days Before 19/02/2011 at 03:15

Contacts from previous E-mail stages, matching Response

From Stage: Drip Campaign Activity

**Notification:**  
 Send on [ ] days [ ] stage is executed

**Wave Activity**

Wave Activity Name: Drip Campaign Activity  
Status: Pending  
Start: 19/02/2011  
Activity Budget: €

**Drip Campaign E-mail**

Subject: Launch of Sage CRM v.1.1

Templates:  
Survey/6 Simple (Global)  
Survey/6 Simple (Global)  
Technology Template 2 (Global)  
Template Blank - 3 Call No Header No Border (Global)  
Transaction or Event Registration 01 (Global)  
Transaction or Event Registration 02 (Global)  
None

Personal Message:

**Drip Campaign Stage**

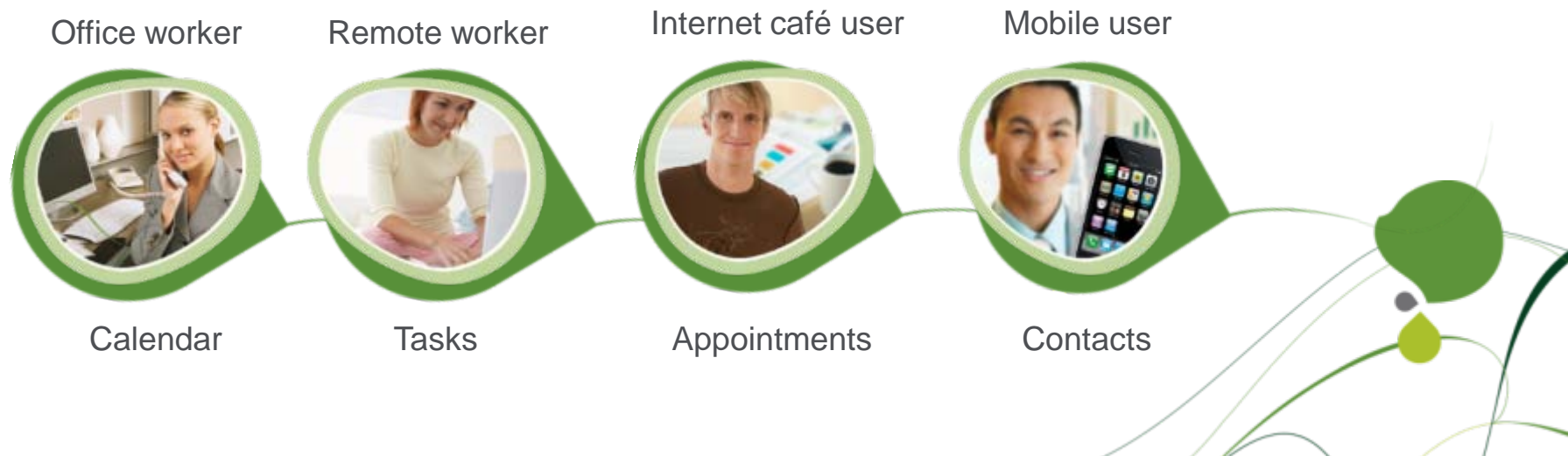
Send on: 1 Days Before 19/02/2011 at 03:15

Send To:  
 All Contacts in Drip Marketing List  
 Contacts from previous E-mail stages, matching Response  
From Stage: [ ]

Notification:  
 Send on [ ] days [ ] stage is executed

# SageCRM Communications Management

- Point-and-click integration with MS Exchange for seamless calendar and communications management regardless of device or location
  - MS Exchange integration with easy point-and-click deployment
  - Server to Server Sync
- Unify all customer interactions and communication history



# SageCRM Microsoft Exchange Server Integration



- Completely point-and-click based configuration
- Select specific mailboxes to synchronize
- Seamlessly store external attendees in customer meetings against relevant CRM contact
- File multiple e-mails against multiple targets

A screenshot of the SageCRM Administration interface. The breadcrumb trail at the top reads: Administration -> E-mail and Documents -> Exchange Server Integration -> Connection Management. Below this, there are three tabs: "Exchange Server Connection" (selected), "User Mailbox Management", and "\*\*\*". The "Exchange Server Connection" tab is active and contains three sections: "Exchange Server Connection Settings", "Sync Engine Options", and "General Configuration Settings".  
**Exchange Server Connection Settings:**  
Exchange Web Service URL: http://10.2.91.224/ews/exchange.asmx  
Exchange Server User Name: ImpersonatedUser  
Domain: exchange.dev.test.com  
Password: \*\*\*\*\*  
**Sync Engine Options:**  
CRM User Name: System Administrator  
Use Default Sync Engine Location: Yes  
**General Configuration Settings:**  
Outlook Plugin Version: 7,1,0,1  
Allow Users to Manually Install Plug-in: No  
Allow Non-Organisers to Edit Linked Organiser Appointments: Yes  
Logging Level: Errors Only  
On the right side of the settings area, there are three buttons: "Change" (pencil icon), "Continue" (green arrow icon), and "Help" (question mark icon).

# SageCRM Total Campaign Management

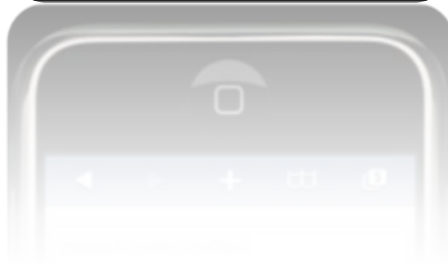
- Multi-channel campaign management
- Campaign cloning
- Out-of-the-box graphical marketing campaign workflow
- Budget over-run alerts
- In-call data modification

The screenshot displays the SageCRM Total Campaign Management interface. At the top, there is a 'Marketing' header with a logo. Below it, a navigation bar includes 'Campaign Summary', 'Communications', 'Report', and 'Shared Documents'. The main content area shows details for a 'Campaign: Cold Calling Campaign'. A table provides the following information:

<b>Campaign Name:</b> Cold Calling Campaign	<b>Start:</b> 02/28/1996	<b>End:</b> 04/29/1996
<b>Status:</b> Pending	<b>Campaign Budget:</b> \$ 20,000.00 £ 12,784.45 @ 1 : 0.639223	<b>Actual Cost:</b> \$ 4,000.00 £ 2,556.89 @ 1 : 0.639223

Below the campaign details, there is a 'Workflow: Standard Workflow' section. It features a tree diagram showing the campaign's progression from 'Start' through 'New Campaign', 'In Progress', and 'Complete' stages. The 'Complete' stage branches into four sub-tasks: 'Do This Not Merge', 'Activate', 'Schedule Telemark', and 'Create Call List'. Each sub-task has its own 'Complete' and 'Cancel' buttons. A sidebar on the right contains various action icons and labels: Change, Delete, Response Setup, Continue, Clone Campaign, Show Wave Activities, Show Analysis, Help, and Cancel Activities (Campaign).

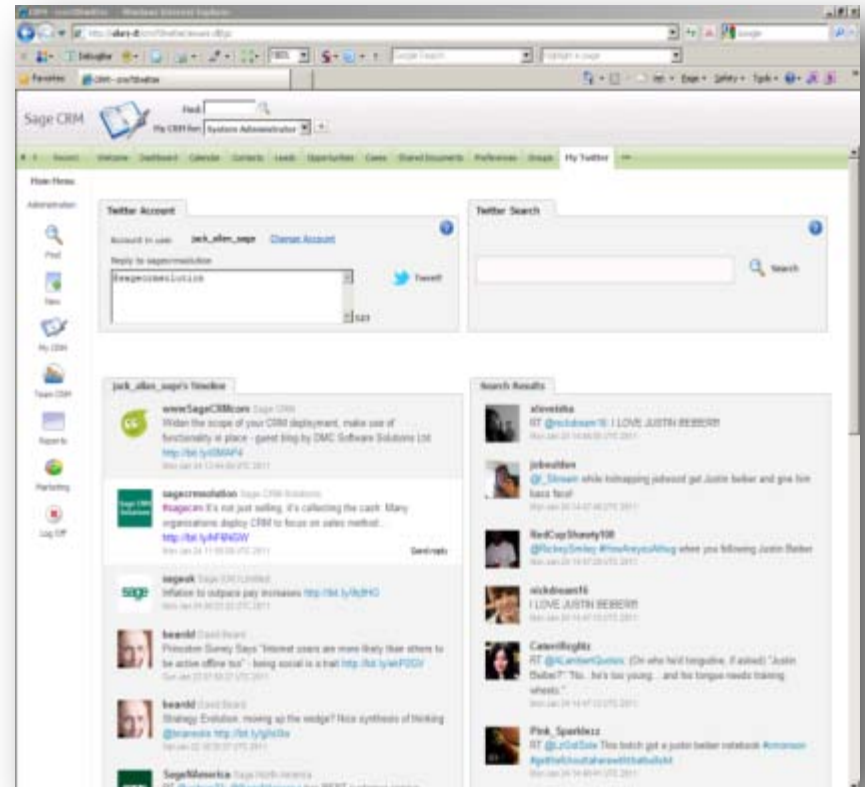
# SageCRM for iPhone



# SageCRM for Twitter



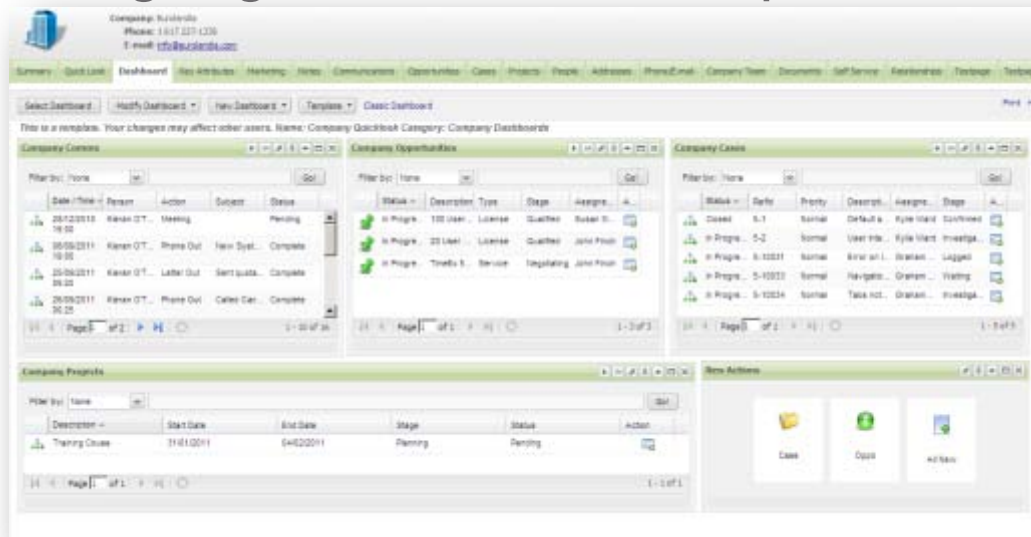
- View and update Twitter
- View and post to a company's and/or person's Twitter feed
- Search for tweets about any company/person
- Save tweets against a company or person in SageCRM





# SageCRM Interactive Dashboard

- Manage key accounts and working day from a single screen
- Delivers key business metrics for easy analysis
- Role-based dashboards out-of-the-box for Sales, Marketing, Customer Service and Management
- Flexible gadgets for maximum personalization



# SageCRM Licensing Options

- Named and concurrent licensing available for SageCRM users
- Sage ERP Accpac user license (Lanpak) requirement eliminated for SageCRM Order Entry as of Version 6.0



Learn more at [www.sageaccpac.com/sagecrm](http://www.sageaccpac.com/sagecrm)



SageCRM Community  
<https://community.sagecrm.com/>





Sage ERP

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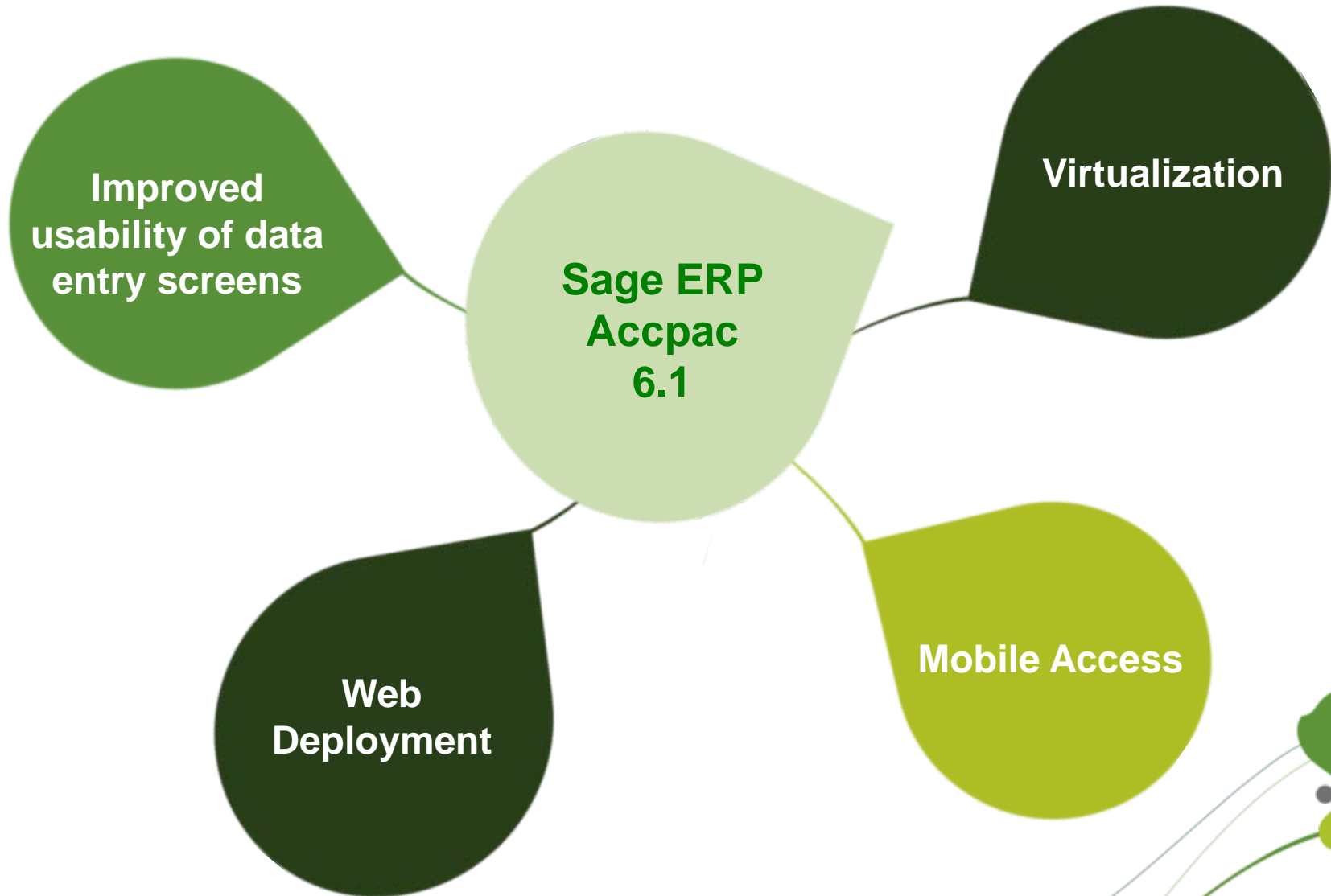
## Sage ERP Accpac Version 6.1

---

Coming Q4 2011

sage

# Sage ERP Accpac 6.1 – What's New



# Sage ERP Accpac 6.1 – Usability

- Improved usability of data entry workflow
  - User Experience modernization
  - Consistent interactions and behavior across screens and across modules
  - Workflow enhancements
    - Personalization of screen layout
    - Intuitive and logical grouping of controls
    - Visually distinguished required fields
    - Optional fields integrated into main screen
    - Auto-suggest in Finders
    - Print multiples of the same report with different configurations

Better  
usability

Happier  
employees

Higher  
productivity



# Sage ERP Accpac v6.1 – Usability

- Improved usability of data entry screens
  - Modernized web screens for core modules
    - Financial: SM/GL/AR/AP/Bank/Tax
    - Operational: OE/IC/PO
- Improved Learnability and Training
  - Contextual help
  - Interactive “how-to” videos
  - Descriptive labeling
  - Web-based help with access to PDF guides

Better  
usability

Happier  
employees

Higher  
productivity



# V6.1 – Modernized User Experience

**SAGE ACCPAC - A/R Invoice Entry**

File Settings Help

Batch Number: 60  
Batch Date: 11/09/2010  
No. of Entries: 0  
Total Amount: 0.000

Document: Taxes | Texts | Optional Fields | Sales Split | Totals

Entry Number: 1  
Customer Number: 1400  
Ship-To Location: Coastal Electric Company  
Document Type: Invoice  
Document Date: 11/09/2010  
Posting Date: 11/09/2010  
Document Number: 11E1111  
PO Number:  
Order Number:  
Shipper Number:

Lin.	Item No.	Q	UOM	Description	Quantity	Unit Price	Extended Amt.	Extens
1	BK-360	EA		Servel Mounting Bracket	1.00000	150.00000	150.00	
2	CD-100	BOX		Model 100 Covers	1.00000	748.00000	748.00	

Account/Tax...

Add Edit Print Print Invoice Done

**Sage Accpac**

Tasks Reports Find Administration

My Shortcuts: A/R Invoice Entry, A/R Invoice Entry, G/L Source Journal Prof..., I/C Component's Bills o..., Adjustment Batch List, Transfer Posting Jo..., Pres

Home A/R Invoice E... Invoice Batch List

Batch Number: 70  
Batch Date: 09/07/2020  
Description: INT: All Billing Cycles  
Number of Entries: 15  
Total Amount: 10,617940

\*Label: 1  
\*Label: INT: All Billing Cycles  
\*Label: No  
\*Label: 1100 Bangon Mart - San Diego  
\*Label: USD  
\*Label: 8088 Price - Estimated  
\*Label:  
\*Label:  
\*Label:

Line	Salesperson Code	Salesperson Name	Percentage	Amount	Extended Amt.
1	BB		0.0000	150.00	300.00
					3,750.00
					950.00
					500.00
					750.00
					224.85

Custom Fields  
Sales Split  
Rates

Add Delete

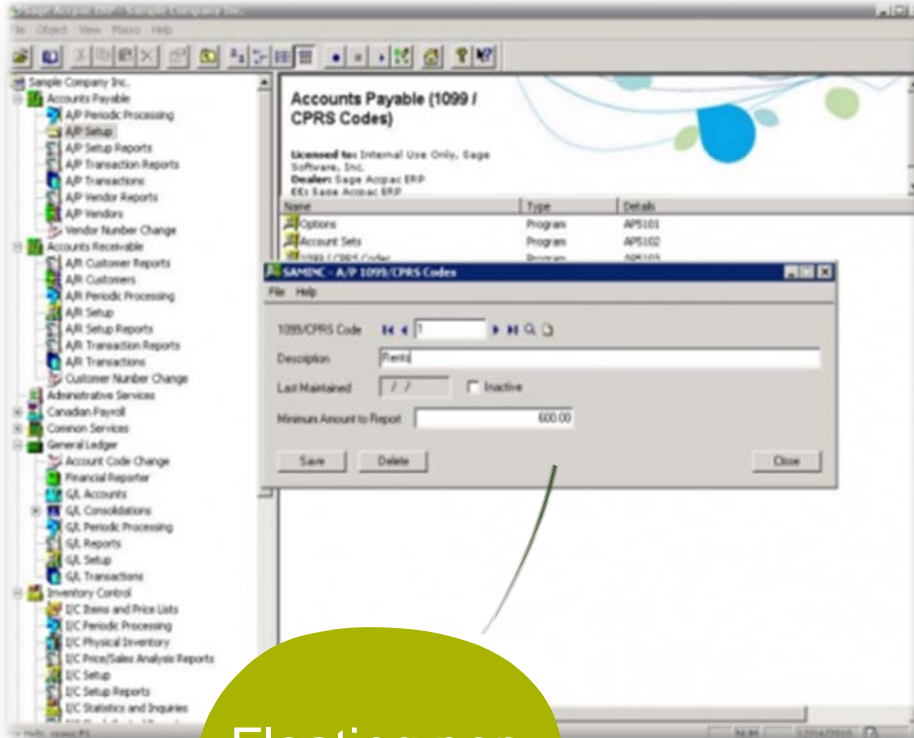
← Classic

New User Experience →





# V6.1 – Modernized User Experience



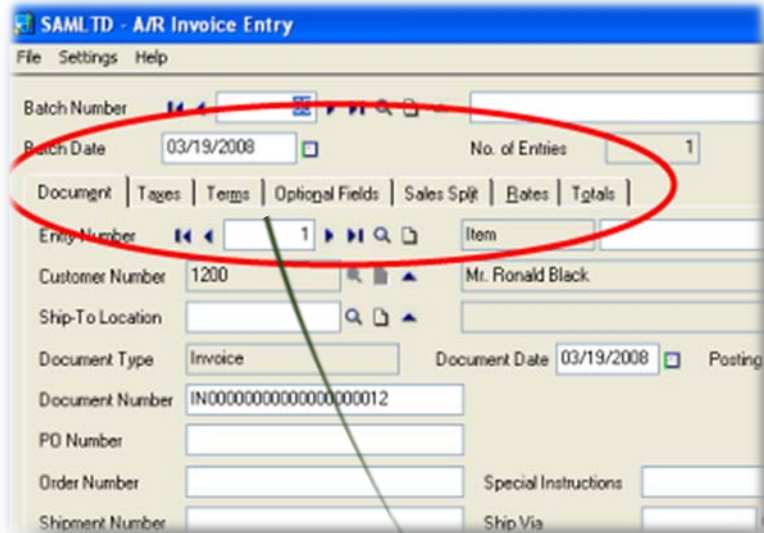
Floating pop-up windows



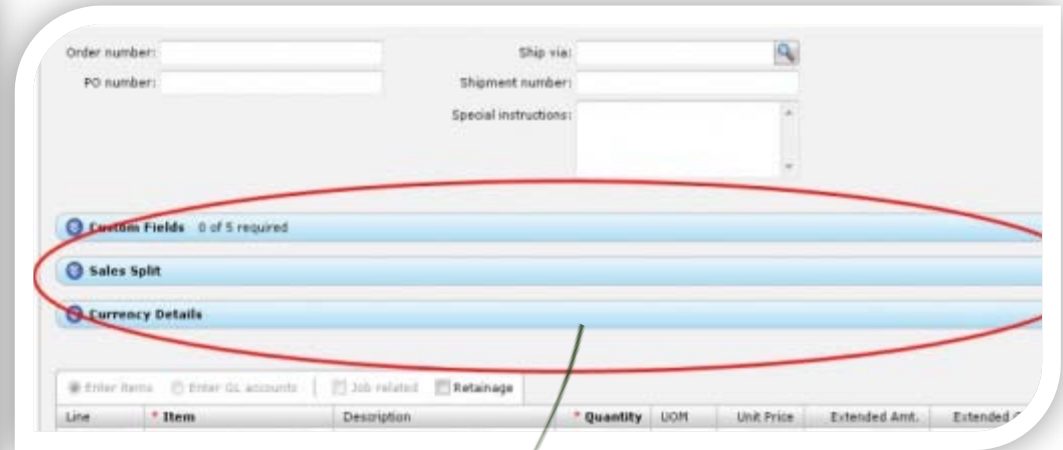
Each screen integrated into the Sage Portal as Tabs



# Version 6.1 – Modernized User Experience



Multiple static tabs to access information

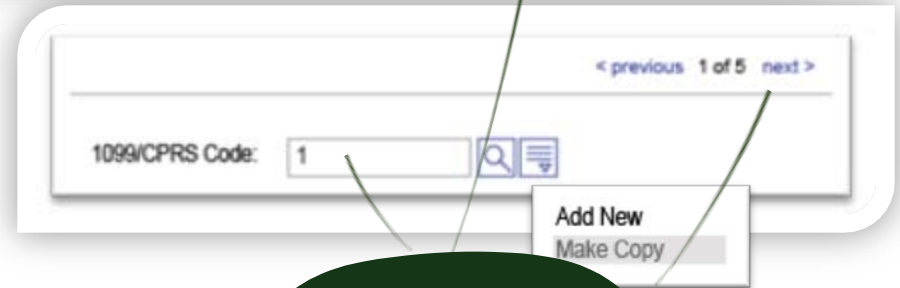
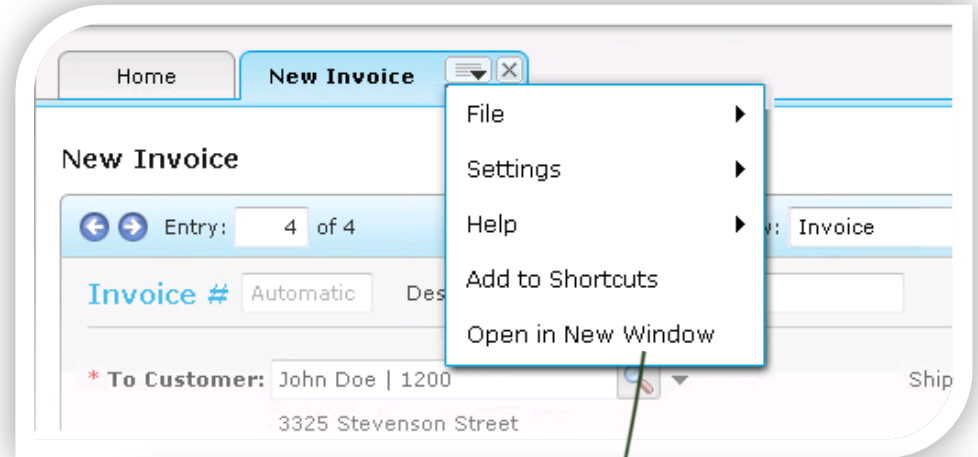
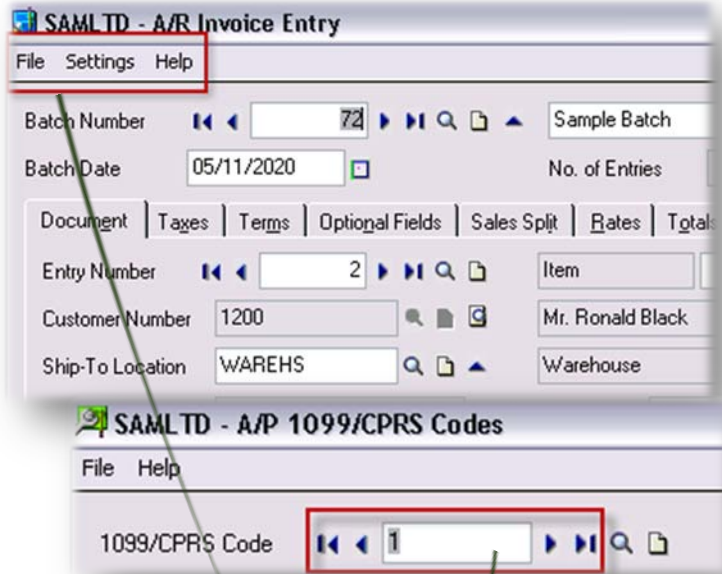


Disclosure panels on single screen that can be opened/closed to show additional information

Classic

New User Experience

# Version 6.1 – Modernized User Experience



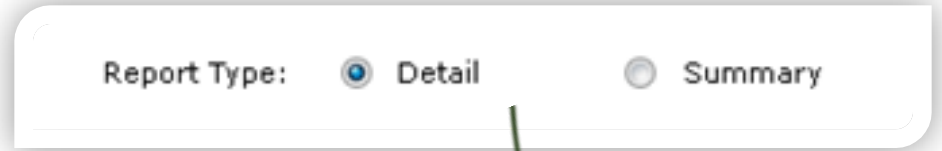
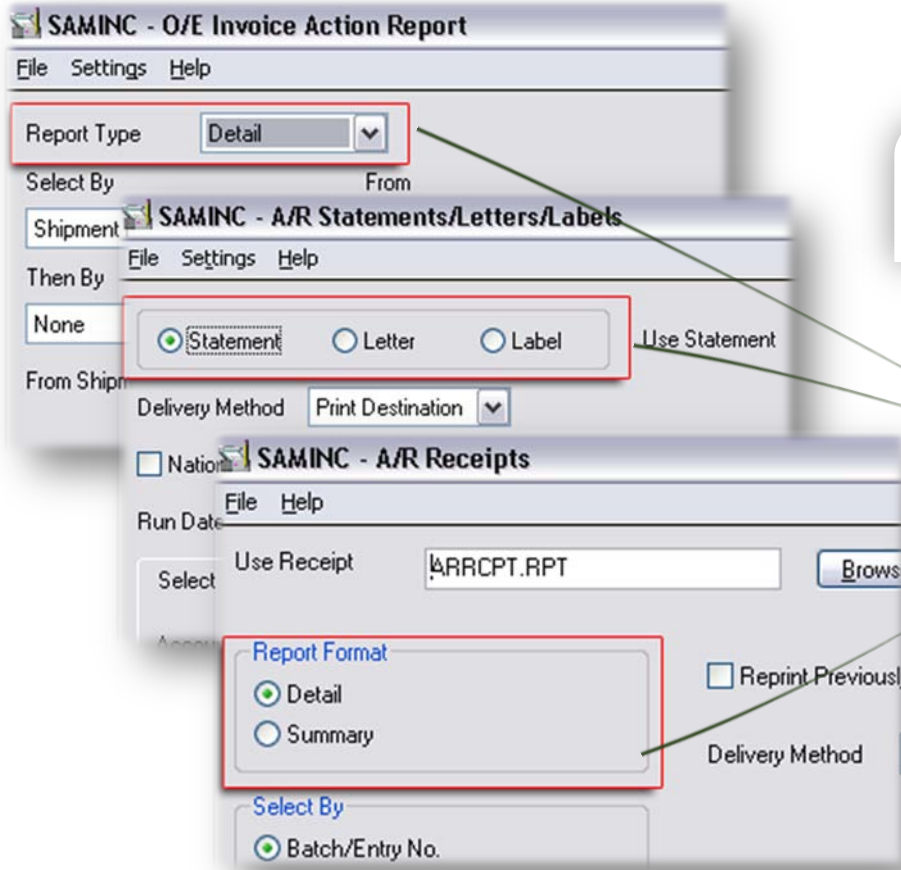
Classic  
Windows  
controls

New Web  
controls

Classic

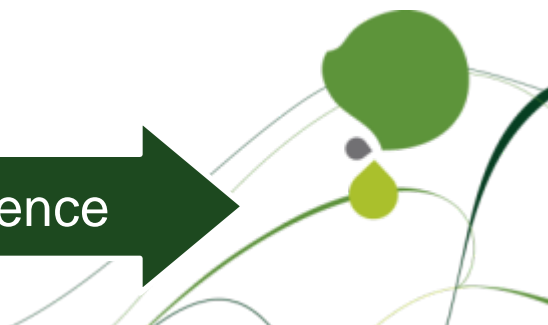
New User Experience

# Version 6.1 - Consistent Experience

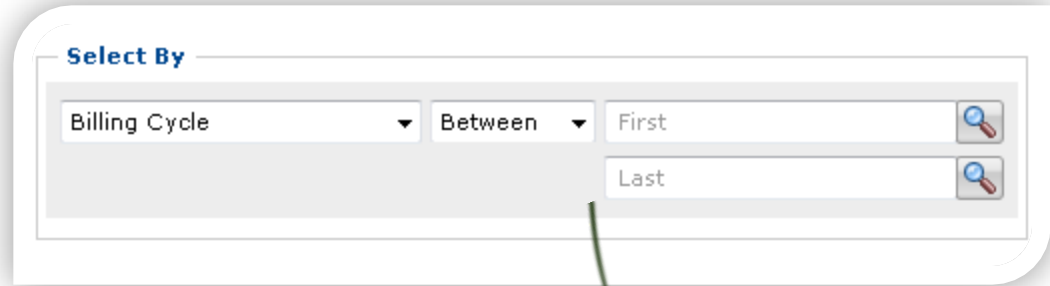
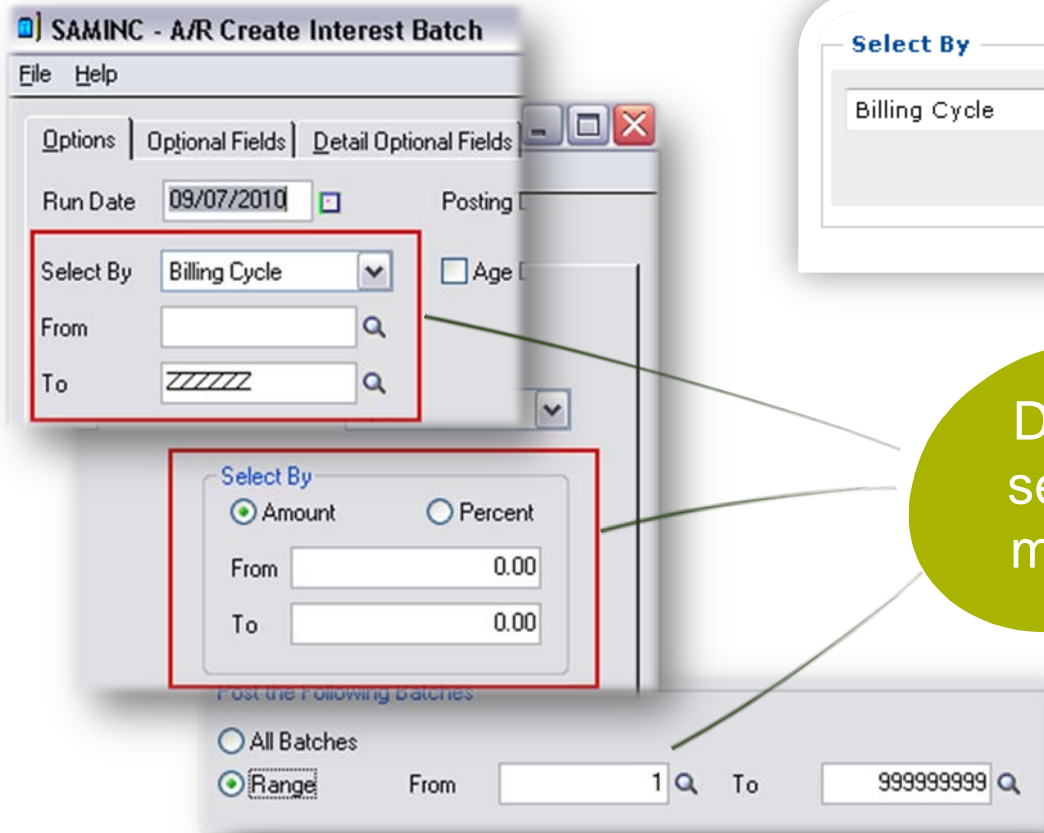


Different selection methods

Standardized selections



# Version 6.1 - Consistent Experience



Different selection methods

Standardized selections



# Version 6.1 - Consistent Experience

Profile | Address | Tag/Sales | Credit Status | Comments | Optional Flds. | Ship-To | Recur. Charges | Ac...

Documents | Receipts | Refunds | Adjustments | Pending | OE Orders | OE Invoices | OE Sales | IC Contra...

Document Type

IN  DB  CR  IT  PY  PP  UC  MC  RF

Order By: Document No.  Include Fully Paid  Include Pe...

Starting Value:    Include National Account Members

Include

- Order Information
- Order Details
- Addresses
- Salespersons
- Prepayments
- Optional Fields
- Job Details
- Retainage Details
- Serial/Lot Numbers

Order Type

- Active
- Standing
- Future
- Quote

Status

- Posted
- Confirmation Printed
- Picking Slip Printed
- Never Shipped
- Partially Shipped
- Completed
- On Hold

Source

- Entered
- Internet

Select Payment Type

- All
- Check
- EFT
- Cash

Include Reconciliation Status

- All
- Cleared
- Reversed
- Outstanding
- Alignment
- Non-negotiable
- Continuation
- Not Posted
- Printed
- Void

Print

Include Order Source

- Entered
- Internet

Include Order Type

- Orders Never Shipped
- Orders Partially Shipped
- Orders On Hold

Different selection methods

Standardized selections



# Version 6.1 – Workflow Enhancements

**Sage Accpac - A/R Invoice Entry**

Batch Number: 60  
Batch Date: 11/09/2010  
No. of Entries: 0  
Total Amount: 0.000

Customer Number: 1400  
Ship-To Location: Coastal Electric Company  
Document Type: Invoice  
Document Date: 11/09/2010  
Posting Date: 11/09/2010  
Document Number: 11E1111

Lin.	Item No.	UOM	Description	Quantity	Unit Price	Extended Amt.	Extens
1	BK-360	EA	Screw Mounting Bracket	1.00000	150.00000	150.00	
2	CD-100	BOX	Model 100 Covers	1.00000	740.00000	740.00	

Static screens for each user

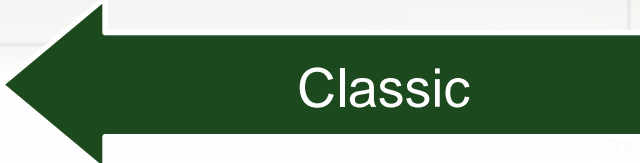
**Sage Accpac Administration**

Batch Number: 70  
Batch Date: 09/07/2020  
Description: INT: All Billing Cycles  
Number of Entries: 15  
Total Amount: 10,617,940

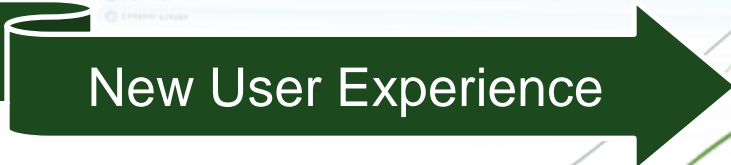
Labels:  
Label: USA  
Label: 09/07/2020  
Label: 09/07/2020  
Label: 2020 - 09

Line	Salesperson Code	Salesperson Name	Percentage	Amount	Extended Amt.
1	BB			150.00	300.00
					3,750.00
					990.00
					500.00
					750.00
					224.85

Individual user preferences retained for each screen, for each user, and between sessions



Classic



New User Experience

# Version 6.1 – Workflow Enhancements

A screenshot of a classic software interface for document entry. It features a vertical list of fields on the left side, each with a corresponding input area on the right. The fields include: Entry Number (with navigation icons and a value of 1), Customer Number (1400), Ship-To Location, Document Type (Invoice), Document Number (with a 'NEW' indicator), PD Number, Order Number, and Shipment Number. The interface is functional but lacks visual cues for required fields.

No  
identification of  
required fields

A screenshot of a modern software interface for document entry. The fields are arranged in a more organized, grid-like fashion. Each field is preceded by an asterisk (\*), indicating it is a required field. The fields include: Label (1), Label (INT: All Billing Cycles), Label (No), Label (1100 Bargain Mart - San Diego), Label (USD), Label (8888 Place - Richmond), and several empty Label fields. The interface is clean and uses visual cues to highlight required information.

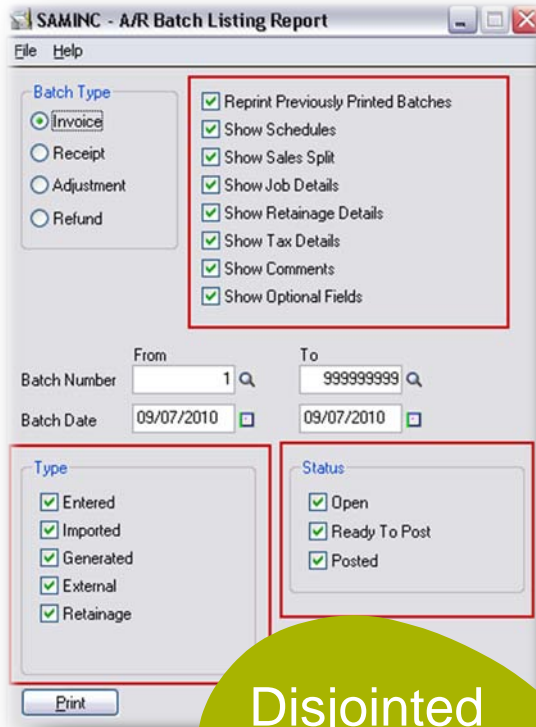
Required fields  
visually identified

Classic

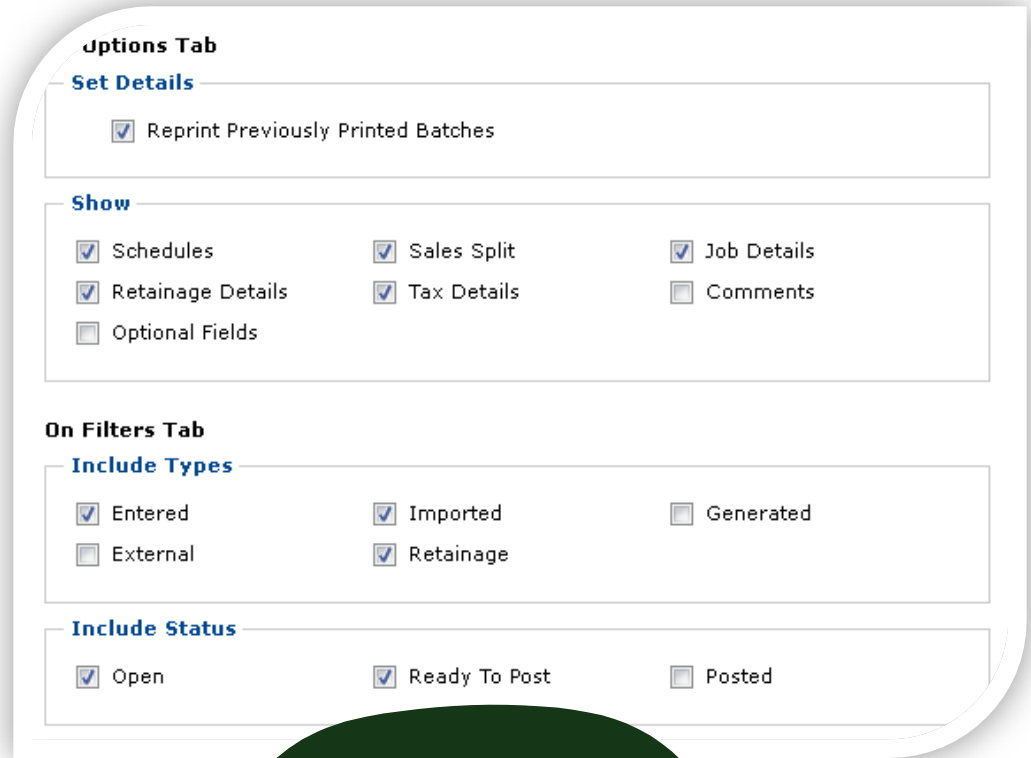
New User Experience



# Version 6.1 – Workflow Enhancements



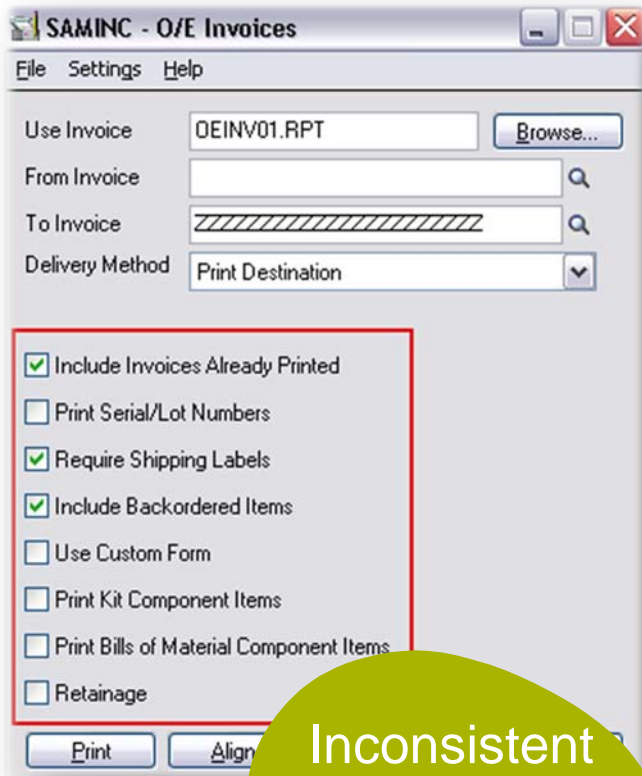
Disjointed grouping



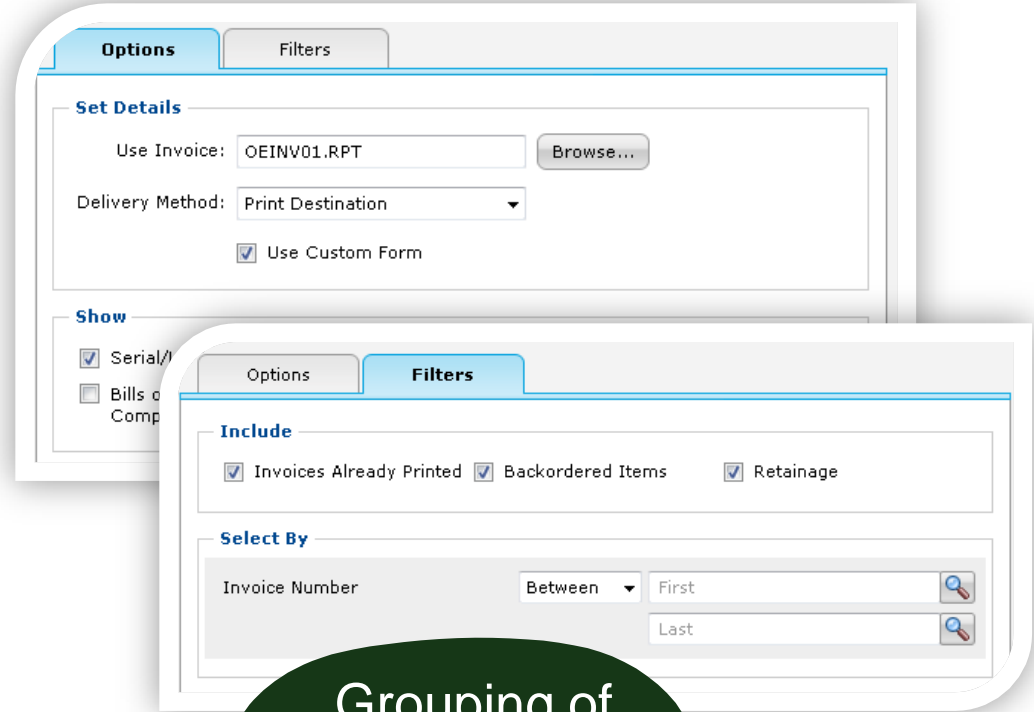
Intuitive grouping and descriptive labels



# Version 6.1 – Workflow Enhancements



Inconsistent and different controls



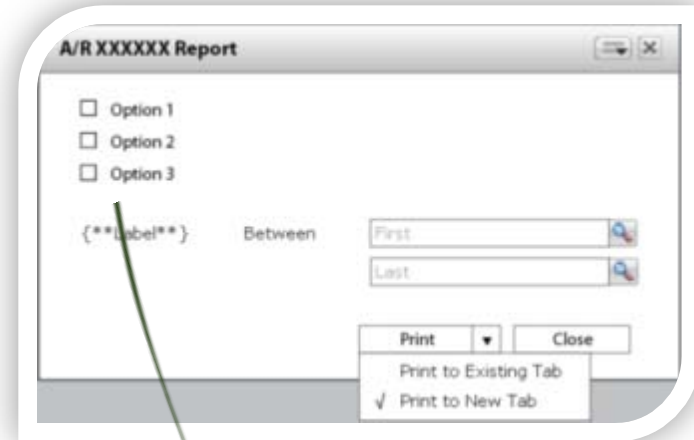
Grouping of similar controls (filters, options)



# Version 6.1 – Workflow Enhancements



Create a single report with options one at a time

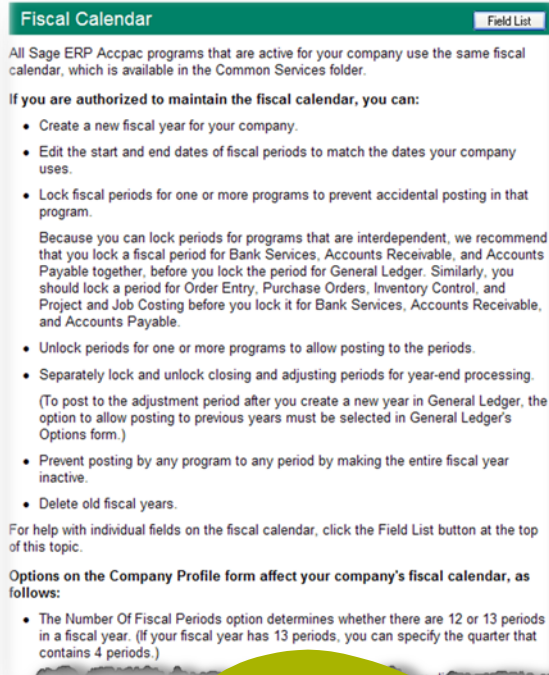


Create multiple versions of a report with different options/configurations

Classic

New User Experience

# Version 6.1 – Learnability Enhancements



**Fiscal Calendar** Field List

All Sage ERP Accpac programs that are active for your company use the same fiscal calendar, which is available in the Common Services folder.

If you are authorized to maintain the fiscal calendar, you can:

- Create a new fiscal year for your company.
- Edit the start and end dates of fiscal periods to match the dates your company uses.
- Lock fiscal periods for one or more programs to prevent accidental posting in that program.

Because you can lock periods for programs that are interdependent, we recommend that you lock a fiscal period for Bank Services, Accounts Receivable, and Accounts Payable together, before you lock the period for General Ledger. Similarly, you should lock a period for Order Entry, Purchase Orders, Inventory Control, and Project and Job Costing before you lock it for Bank Services, Accounts Receivable, and Accounts Payable.

- Unlock periods for one or more programs to allow posting to the periods.
- Separately lock and unlock closing and adjusting periods for year-end processing. (To post to the adjustment period after you create a new year in General Ledger, the option to allow posting to previous years must be selected in General Ledger's Options form.)
- Prevent posting by any program to any period by making the entire fiscal year inactive.
- Delete old fiscal years.

For help with individual fields on the fiscal calendar, click the Field List button at the top of this topic.

Options on the Company Profile form affect your company's fiscal calendar, as follows:

- The Number Of Fiscal Periods option determines whether there are 12 or 13 periods in a fiscal year. (If your fiscal year has 13 periods, you can specify the quarter that contains 4 periods.)

Text-only help



**Video Tutorials**

In these video tutorials, you'll learn how to get started and work more efficiently with new and existing features in Sage ERP Accpac, including shortcuts, snapshots, Sage ERP Accpac Inquiry, fiscal period locking, and SageCRM integration.

To see a current list of all video tutorials, visit the [Sage ERP Accpac Video Tutorials](#) website.

**Note:** The following links open videos in a new browser tab or window, and require an Internet connection.

**Getting Started**

- [Sage ERP Accpac 6.0: Overview \(4:42\)](#)  
Learn about the major changes and key new features in Sage ERP Accpac 6.0.
- [Portal Menu: Overview \(2:43\)](#)  
Use the menu bar in the Sage ERP Accpac Portal to find and open forms and reports.
- [My Shortcuts: Overview \(1:57\)](#)  
Create and arrange shortcuts so that you can open your favorite forms and reports with a single click.

**Snapshots**

- [Snapshots: Overview \(3:22\)](#)  
Add and arrange snapshots on your home page to see key information at a glance.
- [Configuring Snapshots \(6:25\)](#)  
Set up snapshots as they display the information you need.

**Sage ERP Accpac Inquiry**

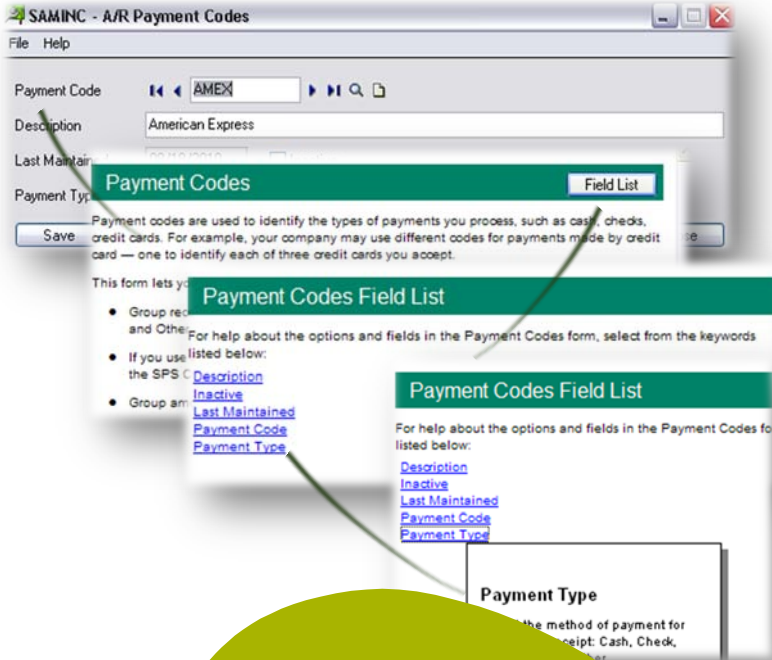
- [Creating a Query \(6:18\)](#)  
Set up filters in Sage ERP Accpac Inquiry to extract only the information you need from General Ledger, Accounts Payable, and Accounts Receivable.

New video-based help with interactive "how to" videos

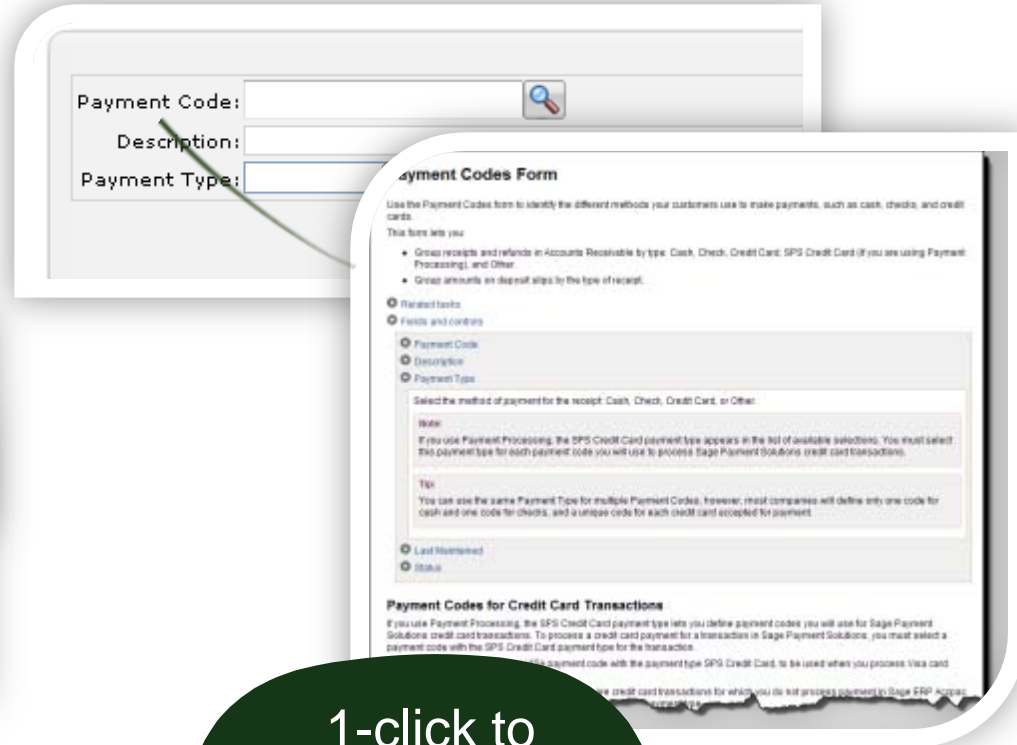
Classic

New User Experience

# Version 6.1 – Learnability Enhancements



No direct link to field-level help – minimum of 3 clicks away



1-click to contextual, field-level help

Classic

New User Experience

# Version 6.1 – Learnability Enhancements

**Include**

- Order Information
- Order Details
- Addresses
- Salespersons
- Prepayments
- Optional Fields
- Job Details
- Retainage Details
- Serial/Lot Numbers

**Order Type**

- Active
- Standing
- Future
- Quote

**Status**

- Posted
- Confirmation Printed
- Picking Slip Printed
- Never Shipped
- Partially Shipped
- Completed
- On Hold

**Source**

- Entered
- Internet

**Show**

- Order Information
- Order Details
- Addresses
- Salespersons
- Prepayments
- Optional Fields
- Job Details

**Include Order Type**

- Active
- Standing
- Future
- Quote

**Include Status**

- Posted
- Confirmation Printed
- Picking Slip Printed
- Never Shipped
- Partially Shipped
- Completed
- On Hold

**Include Source**

- Entered
- Internet

Confusing labels  
and groupings

Descriptive labels  
and intuitive  
grouping

Classic

New User Experience

# Version 6.1 – Web Deployment Mobile Access

- Mobile-enabled web architecture built on industry standard technologies
  - Sage Web Toolkit (SWT) built using technology from Google
  - SData provides XML-based RESTful web services interface using HTTP for communications
  - Browser-neutral and zero-client footprint based on HTML5/CSS3/Javascript
    - Native support for iOS and Android devices and newer Blackberries
    - Native support for Windows Phone with embedded IE 9



Internet Explorer



Google Chrome



Apple Safari



Mozilla Firefox



# Version 6.1 – Mobility



Sage ERP Accpac 6.1  
Web Server  
enables mobility through  
SData Web Services



Smart  
phones



Laptops



Desktops

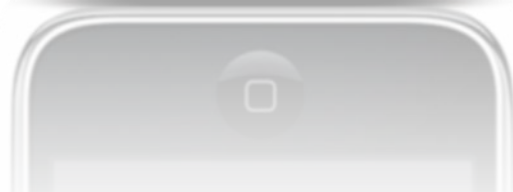


Tablets

Collaborate using any device running an HTML5 browser



# Sage ERP Accpac Version 6.1 on iPhone



# Version 6.1 – Virtualization and Platforms

- Virtual platforms supported
  - VMWare ESX
  - Microsoft Hyper-V – **NEW**
  - Microsoft Windows Terminal Services
  - Citrix Terminal Services
  - Citrix XenApp Server
- Pervasive 11 support - **NEW**



# Learn more about Version 6.1 at <http://smist08.wordpress.com/>

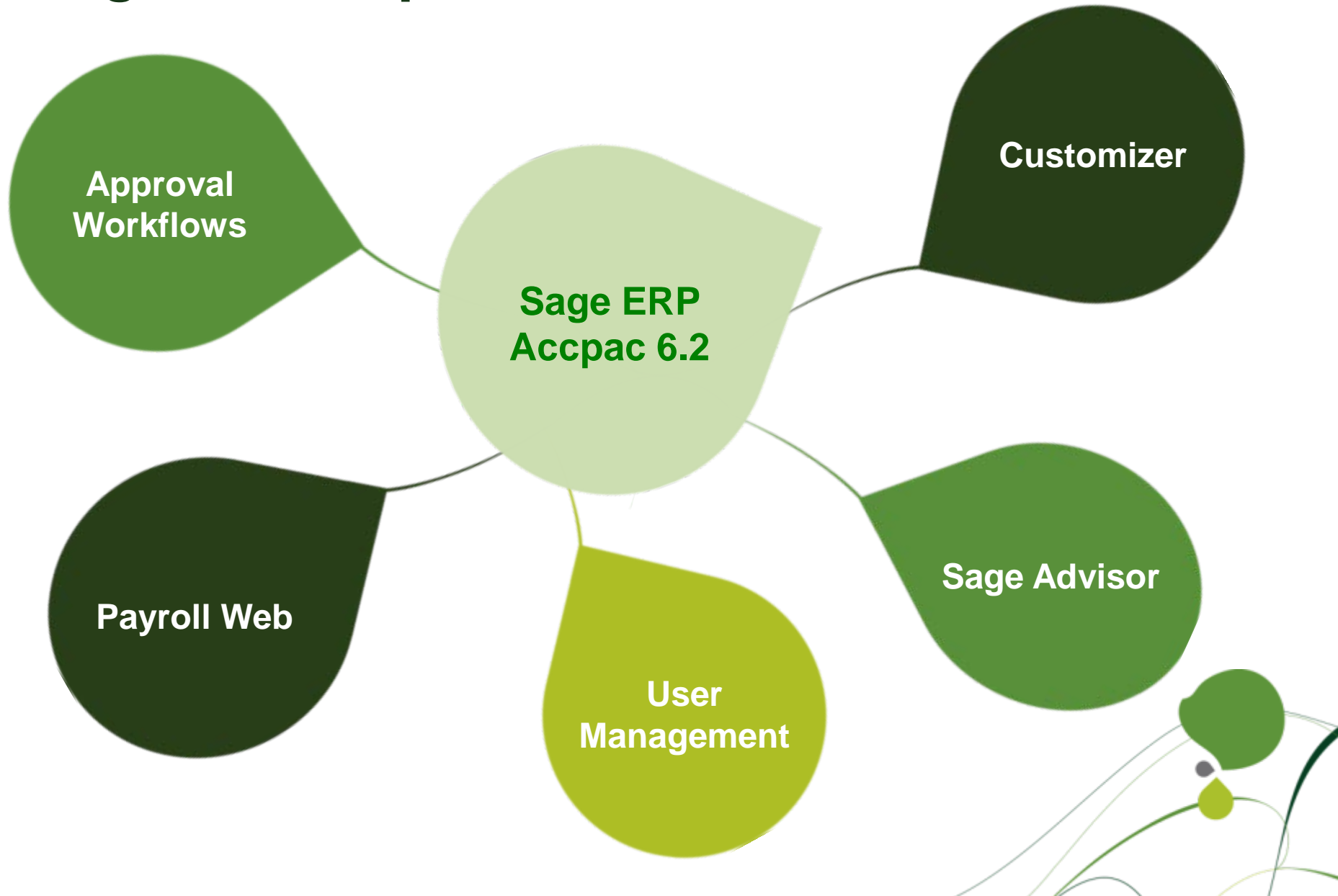


More information about SData  
<http://sdata.sage.com/>

Sage Web Toolkit resources for  
Development Partners  
<http://dppwiki.accpac.com/wiki>



# Sage ERP Accpac Version 6.2 - Themes



## Additional Resources

Sage ERP Accpac Community

<http://community.sageaccpac.com/>

Get Your Voice Heard - Enhancement Requests

[www.sageaccpac.com/Feedback](http://www.sageaccpac.com/Feedback)

Sage Business Care Customer Support Programs

<http://www.sageaccpac.com/Support-and-Training/Business-Care-Plans>